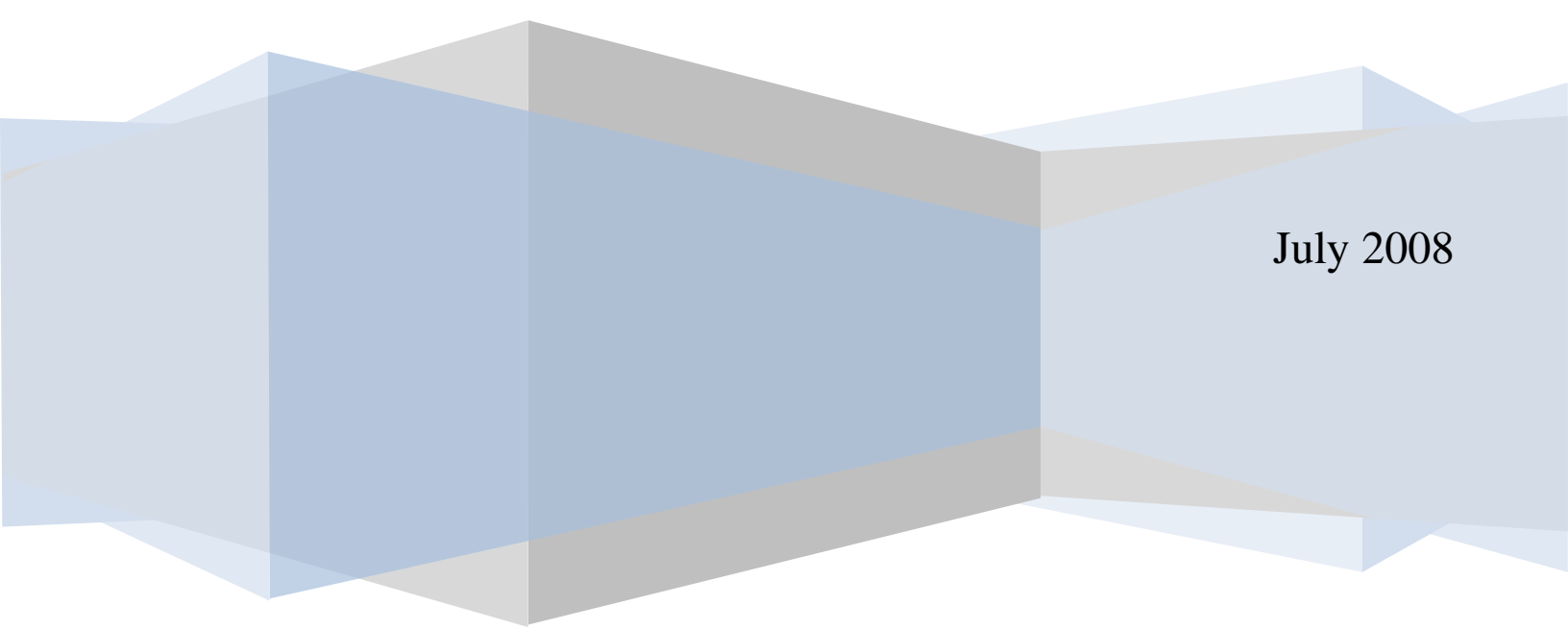


International Development Research Centre

Strategic Evaluation of IDRC's Participation in Large Conferences

Phase One Background Paper: Why and How
IDRC Participates

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Executive Summary

Over the past few years, IDRC has been involved in an increasing number of large conferences. The nature of the Centre's involvement has ranged from being the initiator and main investor, to being an advisor, organizer, participant, observer, or a combination of these. In response to requests from Communications Division and Program and Partnership Branch this report provides the first phase of a strategic evaluation of IDRC's participation in Large Conferences, focusing on why and how the Centre participates. Subsequently, Phase Two will incorporate and build upon these findings and provide an analysis of the results of the Centre's participation.

This strategic evaluation provides information that can be used to guide programming decisions about participating in large conferences and practical advice about “how to” engage in organizing and participating in a large conference. The primary intended users of this evaluation are Communications Division and Program and Partnership Branch senior management. Additionally, this report will be used to assist IDRC staff in planning for future events.

The following evaluation questions are addressed in this report:

- What were IDRC's intentions in participation in conferences? What was the nature of that participation?
- What lessons can Programs and Partnerships Branch and Communications Division draw from the: a) preparatory; b) conference; and c) follow-up phases of participation in large conferences?

A literature review and an evaluability assessment was conducted and, based on the input from Communications Division, eight conferences in which IDRC had participated were selected for an in-depth document review. Two of the eight conferences were also selected as case studies: International Forum on Ecosystem Approaches to Human Health and the Third Global Knowledge Conference (GK3). For each of these cases reviewers conducted a series of key informant interviews, focus groups, and surveys.

The document review found that IDRC engages in different “types” of large conferences with the over-riding objective—for both communications and programs—being to influence policy. However, communications objectives for participating in large conferences tend to focus on promoting and communicating IDRC's work, whereas program objectives focus on dissemination and use of research. The primary types of activities that IDRC engages in at large conferences include funding partner participation; an IDRC booth; panels and sessions; networking events, receptions, and welcomes; innovative events; parallel events; and program, project or product launches.

The lessons that emerged from this study were broken down into three categories based on the different conference phases (preparatory phase, conference phase, and follow-up phase).

Lessons from the *preparatory phase* include recommendations to:

- set a critical path;
- build a realistic timeline;
- plan for follow-up activities;
- gather support from appropriate IDRC divisions;
- coordinate with Canadian actors;
- define and communicate expectations and opportunities for IDRC staff and research partners; and
- weigh environmental costs.

Lessons from the conference *implementation phase* include recommendations to:

- include IDRC welcomes;
- design space for formal and informal interactions;
- procure on-site support;
- arrive early;
- limit piggybacking; and
- reduce the environmental footprint.

Lessons from the *follow-up phase* include recommendations to:

- plan for follow-up;
- use after-action reviews and evaluations;
- communicate IDRC participation with Centre staff;
- follow up with research partners and potential partners; and
- follow up with in-country hosts.

Phase 2 of the evaluation will build on these findings and provide an analysis of the results of the Centre's participation in large conferences.

“Summits represent an important institutional innovation in the world system, combining the legitimacy of supranational organizations, the flexibility of informal meetings of states, and public displays of concern and action on current global problems. . . . Moreover, they are the visible part of the growing informal decision-making power on supranational issues” (Pianta 2001: 169).

“The sheer size, expense, and political and logistical complexity of conferences raise a host of issues and problems that come with bringing people from a wide range of perspectives together to address social inequities and development challenges. This is an ambitious goal and, not surprisingly, governments, the U.N., and non-governmental organizations have expressed frustrations about the process and the outcomes” (Nichols 2005: 3).

1. Introduction

Over the past few years, IDRC has been involved in an increasing number of large conferences. The nature of the Centre’s involvement has ranged from being the initiator and main investor, to being an advisor, organizer, participant, observer, or a combination of these. The widespread involvement of different parts of the Centre (in various capacities) in such events has resulted in various efforts to evaluate particular conferences. This paper will provide the first Centre-wide analysis of the topic¹.

Definition of Large Conference

While IDRC frequently participates in many different types of events (e.g., meetings, workshops, and training activities), participation in large conferences is distinct. Three general characteristics emerge from the literature that are used to define UN summits and are helpful in distinguishing large conferences from other events—*jurisdiction*, *legitimacy*, and *timing* (Klein 2003). Large conferences are typified by a spatial jurisdiction that often expands to the entire global community and a topical jurisdiction that sets boundaries on the types of issues that can be discussed. Legitimacy is often dictated by the amount and quality of stakeholder consultation throughout the conference process and is influenced by the level of institutional and political support a conference or policies produced from the conference receives. *Timing* is dictated by the type and nature of the conference. The timing of an event can also affect its legitimacy and topical jurisdiction and vice versa.

However, a clear and universal definition of large conferences that reflects the nature of IDRC’s participation in these kinds of events did not emerge from the literature. For the purpose of this report, a working definition of a large conference is an event in which multiple areas of the Centre participate (e.g., Communications Division, program area(s),

¹ Communications Division and Program and Partnership Branch raised this as an important modality and topic to evaluate.

program(s), Partnership and Business Development Division, a corporate meeting planner, senior management, etc.) and is an event that is deemed of strategic importance to promoting and enhancing development research related to a relevant topic, project, program, and/or IDRC as a whole. A large conference does not refer to just the size or the amount of resources invested in the event.

2. Strategic Evaluation of IDRC's Participation in Large Conferences: An Overview

This report is Phase One of the Strategic Evaluation of IDRC's Participation in Large Conferences, focusing on why and how the Centre participates. Phase Two will build on and incorporate the findings from Phase One, and focus on the results of the Centre's participation.

Purpose, Use, and Users

The overall purpose of the large conference strategic evaluation (phases 1 and 2) is to:

- assess the nature of IDRC's past engagement in large conferences;
- assess the results of that participation;
- holistically judge whether the benefits justify the costs of these events; and
- draw out practical tools and lessons for IDRC's future engagement in conferences.

It is not, however, the intention of this evaluation to give a definitive judgment about whether IDRC should participate in these types of events in the future, nor to provide an in-depth assessment of any one conference. As a strategic evaluation, this study seeks to provide information that can be used to guide programming decisions about participating in large conferences and practical advice about "how to" engage in organizing and participating in a large conference.

Because different parts of the Centre have different objectives for participating in large conferences, the unit of analysis for this evaluation is IDRC as a whole (i.e., Communications Division, Program and Partnership Branch, and research partners). The primary intended users of this evaluation are Communications Division and Program and Partnership Branch Senior Management. This evaluation will report on the results of IDRC's participation in large conferences and assist IDRC staff in planning for future events.

Phase One: Focus on Process and Description

The overarching questions of the full evaluation assess the results (i.e., outcomes, outputs, and reach), and the process (activities engaged in during the preparatory, conference and follow-up phases) of IDRC's participation in large conferences. The evaluation does not limit itself to a particular time-span and will assess the intended and actual results and process, pre-, during-, and post-conference. In order to target these aspects, the evaluation poses a series of questions on process, description, results, and cost-benefits (see Table 1) that together will give IDRC a holistic understanding of the nature of its participation in large conferences. As Phase 1 of the evaluation, this report responds to only the *process and descriptive questions*.

Table 1: Strategic Evaluation of IDRC's Participation in Large Conferences: Evaluation Questions	
Phase One: Why and How IDRC Participates	
Descriptive Questions: What were IDRC's intentions in participating in conferences? What was the nature of that participation?	Process Questions: What lessons can Programs Branch and Communications Division draw from the: a) preparatory; b) implementation; and c) follow-up phases of participation in large conferences?
Phase Two: Forthcoming	
Results Questions: What has the effect of IDRC and partner participation in large conferences been on: a) raising profile; b) showcasing and promoting the use of research findings; c) providing networking and new partnership opportunities; and d) other relevant results?	Cost-Benefit Questions: To what extent does participation in large conferences produce results of sufficient value to justify their cost?

This evaluation was separated into two phases in order to provide a more use-oriented process. By first synthesizing and aggregating the process and intention of the Centre's participation in large conferences and teasing out the key lessons from this participation, this first phase can deepen the Centre's understanding by providing the overarching context from which the second phase results and cost-benefit analysis can be understood.

From methodological and pragmatic standpoints, there are benefits to separating the analysis of process and results, but this distinction can be arbitrary. Related to the findings generated from the primary data collection for this evaluation and the review of IDRC's documentation, every attempt has been made to analyze only data related to the process and description questions. However, in hopes of furthering IDRC's understanding of large conferences in general, an in-depth review of scholarly and grey literature is included in this report that does not make any real distinction between results and the different processes involved pre-, during-, and post- conferences.

Evaluation Methodology

Selection of Conferences Included in the Evaluation

In 2007, at the request of IDRC's Communications Division, the Evaluation Unit (EU) conducted an evaluability study to determine if there was sufficient data to carry out a comprehensive evaluation focusing specifically on IDRC's participation in large conferences. Based on a list of 12 large conferences selected by Communications Division, the evaluability assessment gathered, recorded, and reviewed all of the related documents available in IDRC's information systems (e.g., project approval documents, trip reports, and evaluation and final reports). The evaluability study concluded that ten out of 12 conferences investigated in the study had sufficient data to be included in a

larger evaluation. Ten conference profiles² were created that document the projects related to the conference, the IDRC staff who participated, and where possible, the conference objectives as identified by both Communications Division and Program and Partnership Branch (PPB).

This evaluation examines eight conferences—seven conferences that were included in the evaluability study as well as one additional conference. Data from all eight conferences were aggregated to demonstrate trends in objectives, activities, and lessons learned from the Centre’s participation in these events.

Six document reviews were carried out and two conferences were examined in depth as case studies. The conferences chosen for document review were selected based on

- availability of data-rich documentation;
- quantity of human and financial resources invested by IDRC;
- representation of the different types of engagement by IDRC; and
- representation of the involvement of different program areas in the Centre.

These conferences include:

1. World Urban Forum (WUF):³ The third UN-Habitat World Urban Forum was held in Vancouver, British Columbia from June 19–23, 2006. IDRC supported 57 partners from around the world to participate in the conference and committed approximately \$1.1 million⁴ to the event (*Final Report*, WUF 2006). The Centre’s participation in this conference included the Environmental and Natural Resource Management (ENRM) Program Area, Communications Division, Special Initiatives Division (SID), a corporate meeting planner, and a conference coordinator.

2. The XVI International AIDS Conference: The International AIDS Conference XVI was held in Toronto, Ontario from August 13–16, 2006. IDRC’s involvement included Partnership and Business Development Division (PBDD), Special Initiatives Division (SID), and five program initiatives: Governance Equity and Health (GEH); Globalization, Growth and Poverty (GGP); Ecosystem Approaches to Human Health (EcoHealth); Acacia; and Institute for Connectivity in the Americas (ICA). Direct and indirect financing totaling \$215,500 supported the participation of approximately 40 partners at the conference (*International AIDS Conference Final Report* 2006).

3. The 11th World Congress on Public Health and The 8th Brazilian Congress on Collective Health (ABRASCO): The ABRASCO conference took place in Rio de Janeiro, Brazil from August 21–25, 2006. IDRC supported 28 research partners to attend the conference. IDRC’s involvement in this conference included Governance Equity and

³ Because IDRC has participated in the same conference bi or tri-annually (e.g., WUF in 2006 and 2004, WWF in 2006 and 2003, and WSIS in 2005 and 2003), this evaluation examines IDRC’s *most recent* participation in these conferences.

⁴ All figures are indicative and do not include IDRC staff costs to travel to the event.

Health (GEH), EcoHealth, the Communications Division, and the Latin American and Caribbean Regional Office (LACRO).

4. The Fourth World Water Forum (WWF): The Fourth WWF took place in Mexico City, Mexico from March 16–22, 2006. IDRC supported 51 research partners to attend this conference. IDRC invested approximately \$1 million for its participation in this conference. Participation from the Centre included the Environmental and Natural Resource Management (ENRM) Program Area, Communications Division, the Latin American and Caribbean Regional Office (LACRO), and Policy and Planning Group (PPG).

5. World Summit on the Information Society (WSIS): The second phase of WSIS was held in Tunis, Tunisia from November 15–19, 2005. IDRC, including the Information and Communication Technology for Development (ICT4D) Program Area and Communications Division, invested approximately \$1.5 million in the conference.

6. World Summit on Sustainable Development (WSSD): WSSD took place in Johannesburg South Africa from August 26–September 4, 2002. IDRC's participation in the conference included International Model Forest Network (IMFN), EcoHealth, and Communications Division. IDRC's investment in this conference totaled approximately \$190,000.

Two conferences were selected as case studies. Case studies were selected based on the quantity of human and financial resources invested by IDRC as well as a lack of secondary data. The case studies selected include:

7. The Third Global Knowledge Conference (GK3): GK3 was held in Kuala Lumpur, Malaysia from December 11–13, 2007. Together with the Swiss Agency for Development Cooperation (SDC) and the Global Knowledge Partnership (GKP), IDRC helped shape, organize, and support GK3. IDRC supported 176 research partners to participate and supported GKP with a \$1.3 million grant to develop and implement the conference (*GK3 Final Report*). IDRC's participation in the conference included the Information and Communication Technology for Development (ICT4D) Program Area, Communications Division, a corporate meeting planner, and a conference coordinator.

8. International Forum on Ecosystem Approaches to Human Health (EcoHealth Forum): The EcoHealth Forum was held in Montréal, Quebec from May 18–23, 2003. Over 350 participants, researchers, practitioners, government representatives, and students were brought together at the Forum. IDRC supported 110 research partners to participate in the forum. IDRC played the lead role in designing and implementing the conference and received financial support from Health Canada, Environment Canada, Canadian International Development Agency (CIDA), the Ford Foundation, the United Nations Environmental Programme (UNEP), the World Health Organization (WHO), the Biodôme de Montréal, the International Society for Ecosystem Health, the Université du Québec à Montréal, and the Ministry of Health and Social Services for the Government

of Quebec (*Forum Evaluation*). IDRC's participation in this conference included EcoHealth, Communications Division, and a conference coordinator.

Evaluation Advisory Committee

IDRC's participation in large conferences includes the involvement of multiple parts of the Centre. In order to incorporate these diverse perspectives into the evaluation, an advisory committee was struck. The committee is comprised of one representative from the Communications Division, one representative from Programs and Partnerships Branch (PPB) and one representative from the Evaluation Unit (EU). The Advisory Committee has and will continue to play a supportive role throughout the evaluation. This support includes providing guidance and reviewing the evaluation terms of reference and the draft report, among other tasks. Once both phases of the evaluation are completed, the Advisory Committee will also help disseminate evaluation findings throughout the Centre.

Sources

The key sources of information and data used in this evaluation are:

Review of relevant literature: External literature relating to summits, conferences, and workshops was reviewed. Any literature that was deemed useful in furthering IDRC's understanding of large conferences is highlighted in this report.

Review of IDRC files: All relevant and available documents related to the eight conferences outlined above were reviewed. These documents were mostly final evaluation and conference reports, project approval documents (PADs), planning documents, notes from strategic meetings, and trip reports. Annex 3 includes a list of all documents reviewed for this report.

Key informant interviews with IDRC staff: Interviews were carried out with IDRC staff who were closely involved in the planning of the conferences included in this study. Staff from Programs and Partnership Branch (PPB), the Communications Division, the Evaluation Unit (EU) and the Grant Administration Division (GAD) were included in this process. Because the data collection for the GK3 final report overlapped with the data collection for this strategic evaluation, three interviews were conducted by the Coordinator of the conference and author of the GK3 final report. It was elected to proceed in this fashion instead of interviewing IDRC staff multiple times. (See Annex 2 for a list of key informant interviews.)

Key informant interviews with IDRC partners: Telephone interviews were conducted with IDRC partners who participated in the GK3 conference. Partners who presented at panels, participated in workshops and receptions, and other events were included in the study. In addition, the coordinator of the conference sent a follow-up email to the 176

partners who participated in GK3.⁵ In response to this request, 15 responses were received and used to provide further data from research partners (see Annex 2).

Focus groups: Evaluators facilitated a focus group with the GK3 Action Team and observed an all-staff focus group with those who attended GK3 (see Annex 2).

Requests sent to international organizations: Twenty different international organizations that regularly participate in large conferences were surveyed.

Methodological Limitations

While collecting primary data from all eight conferences would have resulted in greater data triangulation, it may also have overburdened IDRC staff and partners with multiple requests or interviews. Based on feedback from the Advisory Committee, it was elected to collect primary data for only two conferences—GK3 and The EcoHealth Forum. However, it is anticipated that Phase Two of the strategic evaluation will select alternative conferences and that different staff and partners will be interviewed.

As the EcoHealth Forum took place in 2003 and the focus of this evaluation is on process, it made sense to interview only IDRC staff for this case study.⁶ For GK3, both IDRC staff and partners were interviewed. The primary data for this evaluation were collected three months after staff and partners participated in the GK3 conference. The benefit to this timing is that the strengths and challenges of IDRC's participation in this event were in recent memory.

⁵ The email follow-up requested partners to comment on significant highlights of GK3 (both successes and challenges), outcomes, and to provide any interesting photos. . .

⁶ IDRC partners who participated in EcoHealth did not assume a role in the preparatory phases of the Conference beyond two Canadian partners who did not respond to interview requests. . .

3. The Nature of IDRC's Participation in Large Conferences

Types of Conferences

IDRC engages in different types of large conferences. Table Two presents a typology of large conferences drawn from the literature (Nichols et al. 2003; Klein 2003; Pianta 2001) and adapted to include types of conferences not represented in the literature, but relevant to IDRC's experience. It categorizes the conferences included in the evaluation according to the type of conference.

Table 2: Typology of Conferences	
Type of Conference	IDRC Participation
<p>World Summit and Parallel/NGO Forum A World Summit is typically an official meeting of governments convened by the United Nations to address global development challenges. NGOs generally need to be accredited to attend and often can only observe and not participate (Nichols 2003). Generally, a World Summit requires two years of preparatory activities, the summit itself attracts thousands of participants, two documents are produced, and a follow-up conference occurs afterwards (Klein 2003). A Parallel Summit (or NGO Forum) is a meeting of NGOs that may run along side a World Summit (Nichols 2003). Parallel Summits are generally organized by civil society groups with participation that is independent of the activities of states and firms. They address the same fundamental problems as World Summits, but offer a critical perspective on government and business policies (Pianta 2001).</p>	<p>World Summit on Sustainable Development (WSSD)</p> <p>World Summit on the Information Society (WSIS)</p>
<p>UN-Led Forum A UN-led forum is similar to a World Summit; however, it generally happens on a bi- or tri-annual basis, instead of being a one-time event.</p>	<p>World Water Forum (WWF)</p> <p>World Urban Forum (WUF)</p>
<p>International Civil Society Meeting An International Civil Society Meeting is an NGO gathering as a main event, not a side conference to another event (Nichols 2003).</p>	<p>International AIDS Conference</p> <p>11th World Congress on Public Health (ABRASCO)</p>

Meetings of Multilateral Institutions (e.g., World Bank) Meetings of Multilateral Institutions are not generally open to participation by civil society actors. The meetings are regular events, occurring annually or more frequently (Nichols 2003).	
IDRC Partner-Led Event An IDRC partner-led event is a large conference led by one or more of IDRC's research partners, with support from IDRC.	The Third Global Knowledge Conference (GK3)
IDRC-Led Research Forum IDRC-led research forums are those initiated by IDRC and where the Centre plays a lead role in its implementation.	International Forum on Ecosystem Approaches to Human Health (EcoHealth Forum)

Adapted from Nichols et al., 2003

Nichols et al. conceptualizes four types of conferences—World Summits, Parallel/NGO Forums, International Civil Society Meetings, and Meetings of Multilateral Institutions. For the purposes of this evaluation, World Summits and Parallel/NGO Forums were combined into one category because IDRC's participation has tended to hover somewhere between the two. For example, the Centre has been invited to participate as a part of official Canadian delegations and has supported research partners, generally considered civil society actors, to participate in sessions and panels of a conference. Given IDRC's status as a Crown Corporation of Canada and its relationships with its research partners, this flexibility in association has not only been fitting but also has provided opportunities to influence discussions—both with civil society actors and policy makers.

Three additional categories were added to the typology to reflect the full range of large conferences in which IDRC's participates. While UN-led forums are not world summits, they are similar and warrant inclusion. The key similarities between summits and these types of forums is that they are both UN-led; however, summits are generally a one-time occurrence whereas forums generally happen on a bi-or-tri annual basis.

IDRC also participated and supported a partner-led conference. This type of conference only surfaced once (GK3); however, it fits well with IDRC's mandate and the Southern research-oriented nature of its work. Finally, the EcoHealth Forum is an excellent example of an IDRC-led conference, where the Centre not only initiated the conference but also played a lead role in its implementation. As noted earlier, these two types of conferences are examined as case studies in this evaluation.

Objectives for Participation in Conferences

Background

Little literature exists to expand the overall understanding of the purposes and significance of large conferences in the international arena. What literature does exist focuses on a specific type of conference—the UN Summit. Nonetheless, a “Six Core Functions of Conferences” theoretical framework emerges from the literature (see Table 3) that helps to contextualize IDRC’s participation in these events. This framework incorporates the policy influence element but allows for an expanded and more holistic understanding of the intended purpose of conferences. Policy influence is specifically isolated here as an intended purpose because a substantial portion of the (limited) literature focuses on this topic. Policy influence is often a key Communications and Program objective for IDRC’s participation in these types of events.

Policy Influence

Large conferences, particularly UN Summits, are often seen as a strategic arena to influence policy. While there is little evidence to suggest the presence of a causal link between one specific event and concrete policy impact, some argue that ‘open-ended’ strategic forums or forums designed with the purpose of sustained follow-up are more likely to have an impact on policy (Lavis et al. 2005; Teppen 2004; Klein 2003; Ginsburg and Plank 1995). Moreover, events are more likely to influence policy when they create more than just a “big splash” and are able to sustain attention over extended periods of time (Ginsburg and Plank 1995). Interest and dialogue that starts in a conference and is maintained over extended periods can foster a two-way ‘exchange’ process between policy makers and researchers and create a cultural shift (Lavis et al. 2005). A “decision-relevant culture” can be instilled among the research community, and an evidenced-based culture can be created among policy makers (Lavis et al. 2005). The effectiveness of a conference, particularly related to policy influence, cannot simply be measured in the microcosm of the two-or-three day event. Instead, conferences should be seen as events that are part of an extended process that extends over years (Klein 2003).

While some conferences, particularly UN Summits, create action plans that are not always accompanied with full implementation processes, the strategies endorsed by the conferences are, argues Klein, imbued with prestige (2005). Teppen synthesizes the potential benefits of large-scale conferences into seven key opportunities. Large conferences can shape policy by:

1. helping to frame or reframe a problem;
2. calling attention to new and important research;
3. creating and sustaining communities of experts;
4. softening up audiences for a new idea or proposals;
5. sustaining the momentum for an idea during politically fallow times;
6. fostering policy transfer and knowledge uptake; and
7. helping policy entrepreneurs test ideas, develop meaningful and influential contacts and networks, and predict or plan for the opening of future policy windows (Teppen 2004: 540).

Other Core Objectives

While policy influence is an important intended purpose of large conferences, it is often just one of many objectives that the Centre sets out for its participation. In order to give a more comprehensive and holistic picture of these types of events, an adaptation of the "Six Core Functions of Conferences" framework is presented here (Seygang 2003, 2002), with the related key opportunities and challenges.⁷ Like much of the literature written on this topic, the major limitation to this framework is its narrow focus on UN Summits.

Table 3: Six Core Functions of Large Conferences	
Core Function:	Opportunities and Challenges:
1. Setting Global Agenda	<ul style="list-style-type: none">+ a politically realistic means of discussing big issues that have a genuinely global reach+ capture public attention, introduce debate, and raise public awareness– media attention can focus just on ‘failures’ of summit– agendas can be recycled decisions of already global consensus
2. Facilitating "Joined-Up" Thinking	<ul style="list-style-type: none">+ space to hold a global dialogue about global issues+ forces politicians to raise their horizons and consider strategic, longer-term questions that might otherwise be sidelined by day-to-day economic and political exigencies– not all aspects of development are opened up for discussion; some things are off the agenda (e.g., certain social, economic, and political agendas are not discussed)
3. Endorsing Common Principles	<ul style="list-style-type: none">+ produce ‘soft-laws’ – halfway stage in the development of more binding legal frameworks – expectation that ‘soft-laws’ will become more binding– agreements and principles signed at large conferences are rarely binding and implementation strategies are generally not created– some consider conferences to be high-profile, expensive talking shops that create a façade of change
4. Providing Global Leadership for National and Local Governments	<ul style="list-style-type: none">+ effective at exercising world leadership by defining fresh objectives for action at lower tiers of governance– system of review and monitoring of action plan would encourage more successful implementation– development issues do not come in neat packages - disentangling the ‘local’ from the global is extremely difficult
5. Building Institutional Capacity	<ul style="list-style-type: none">+ create new institutions in the UN (e.g., UNEP) and indirectly build new institutional capacity by creating domestic political opportunity structures+ should be viewed as a part of a larger process toward institutional and societal change instead of one-off events– new institutional innovations are weak
6. Legitimizing Global and Governance Inclusivity	<ul style="list-style-type: none">+ participation of civil society more significant and increased+ stakeholders have structured input into certain agenda setting processes (e.g., UNCSD)– nature of summits is remote and elitist – struggle to truly capture priorities and debates of grassroots organizations– magnets for large and better resourced interest groups, therefore not truly representative

⁷ The opportunities and challenges were also compiled and synthesized from Seygang’s two articles (2003, 2002). . .

IDRC's Objectives

IDRC's objectives for participating in the conferences reviewed for this evaluation closely match many of the objectives listed for large conferences in the literature. Table 4 presents the results from the evaluation and lists the objectives for communications (with a focus on promotion and communication) and programs (with a focus on promotion, dissemination, and use of research) separately. While many of these dovetail, each area brings its own specific focus to the objective. The purpose of this table is to help characterize the intentions of the Centre's participation rather than to comment on whether specific outcomes were achieved related to these objectives.

Table 4: IDRC's Objectives for Participating in Large Conferences	
Objective	Frequency
<i>Communications (n=5*)</i>	
Encourage new and existing donors to invest in programs	6
Demonstrate IDRC's experience with policy influence/continue to influence policy	5
Strengthen IDRC's relationship with or demonstrate IDRC work to Canadian government departments and international organizations and researchers	4
Position IDRC as an expert in a particular field	3
Raise international and public awareness and disseminate conference proceedings	3
Unveil an IDRC program, project, or product	2
<i>Programs (n=8)</i>	
Strengthen existing and new collaborative learning and reflection	9**
Provide an opportunity for IDRC and partners to share research results and evidence on a global stage	8
Increase awareness and influence policy	4
Promote a specific field or discipline	3
Increase IDRC's and partners' visibility and demonstrate IDRC's leadership	3
Provide an opportunity for interaction and capacity building between program staff and partners	2
<p>*The International AIDS Conference, ABRASCO, and WWF communications strategies were not available in the IDRC information system.</p> <p>** One conference had two objectives that related to this theme. All eight conferences listed this objective and to "provide an opportunity for IDRC and partners to share research results and evidence on a global stage" as fundamental to the Centre's participation in the conferences.</p>	

The most frequently cited program objective (to “strengthen existing and new collaborative networking relationships...”) correlates with three of the most frequent types of activities IDRC supports in conferences: supporting partners participation, networking events such as receptions and welcomes, and panels and sessions. (See Table 5.)

Activities at Conferences

Table 5 provides an overview of the types of activities that IDRC has funded at the large conferences included in this evaluation. It illustrates the general nature of IDRC’s participation at the events and is not intended to evaluate specific successes and challenges—these are drawn out in the case studies and final lessons section of this evaluation. While there were activities that tended to be more programs-driven (e.g., financially supporting partners’ participation) and those that were more communications-driven (e.g., the IDRC booth), it seems neither useful nor accurate to disaggregate these activities, as both programs and communications play a significant role in most large conference activities. For example, the IDRC booth was often manned by Communications staff (e.g., at WSIS, WUF, and the EcoHealth Forum), but served as an arena for demonstrations, short trainings, and knowledge sharing activities led by Programs staff. As described by a member of the Communications Division, “Programs and the work of our partners shape everything we do at large conferences.”

Table 5: Conference Activities Funded by IDRC	
Activity	Frequency
Partner participation	8
IDRC booth	8
Panels and sessions	8
Networking events, receptions, and welcomes	7
Innovative events (e.g., photo contests, cultural events, site visits, etc.)	5
Parallel events	4
Program, project, or product launch	3

4. Case Studies of IDRC’s Participation in Large Conferences

The following section presents two case studies that illustrate the nature of IDRC’s participation in large conferences and highlight the associated opportunities and challenges. Each case study represents a different type of engagement (IDRC-led and partner-led) and includes an overview of the intentions, influences, and IDRC fit; a description of key planning and coordination issues, as well as process challenges and successes; and a synopsis of key lessons that could be used to guide IDRC’s future participation and involvement in large conferences.



Case Study 1: IDRC-Led Research Forum

Advancing the Field in the International Forum on Ecosystem Approaches to Human Health

The International Forum on Ecosystem Approaches to Human Health, or EcoHealth Forum, was held in Montréal, Quebec from May 18–23, 2003. Over 350 participants, researchers, practitioners, government representatives, and students were brought together from 42 different countries. IDRC supported 110 research partners to participate in the Forum. As the lead in designing and implementing the conference, IDRC began preparing for the EcoHealth conference in 2001, two years prior to the event. Key players from IDRC included the EcoHealth Program Initiative, Communications Division, and a conference coordinator. Financial support for the Forum came from Health Canada, Environment Canada, Canadian International Development Agency (CIDA), the Ford Foundation, the United Nations Environment Programme (UNEP), the World Health Organization, the Biodôme de Montréal, the International Society for Ecosystem Health, the Université du Québec à Montréal, and the Ministry of Health and Social Services for the Government of Quebec.

Intentions, Influences, and IDRC Fit

IDRC's Ecosystem Approaches to Human Health (EcoHealth) Program Initiative supports research on the relationship between all components of an ecosystem to define and assess priority problems that affect the health of people and the sustainability of their ecosystem. The EcoHealth approach focuses on the design of solutions based on ecosystem management rather than on health sector interventions. During the visioning and inception phases, the EcoHealth Forum was originally intended to engage a broad range of stakeholder groups and donors to raise the profile of and funding available for EcoHealth research. After a change in leadership in the EcoHealth Program Initiative, the intentions of the Forum shifted. While resource expansion remained an important goal, it was decided that the Forum would be an ideal arena to demonstrate the value of the ecosystem approach to improving health and well-being; share knowledge among

researchers, policy makers, practitioners, and civil society representatives; and further a community of practice in EcoHealth.

After the first planning meeting in 2001, it was decided to hold the Forum in 2003, a year after the World Summit of Sustainable Development (WSSD) in 2002, to avoid competition with WSSD and to use the convening power of the Summit to promote IDRC's event. According to IDRC staff, "We were able to seize these opportunities because we were open to these opportunities."

During the same period, the Canadian government became involved with the Health and Environment Ministries of the Americas (HEMAs). This involvement aimed to create networks between the health and environment sectors to address issues of mutual importance while strengthening countries' abilities to manage health and environment issues effectively (IISD, 2002). In 2001, the meeting of the HEMAs took place in Ottawa, which provided an opportunity to promote the EcoHealth approach and the Forum to an international audience. In particular, the keynote address by IDRC's President and the Mexican Minister's mention of IDRC in his address served as promotional tools for the EcoHealth Forum.

The momentum for the Forum continued at WSSD, where representatives from IDRC participated in high-profile panels and successfully lobbied the Canadian Minister of the Environment and the Special Session of Health and the Environment at WSSD to make announcements about the EcoHealth Forum. One IDRC interviewee recounted that participation in the WSSD allowed IDRC to "create a buzz for the Forum in the policy sphere."

Planning and Coordination Issues: Mobilizing Resources

During the early planning phase, as recalled by several IDRC interviewees, the Centre was philosophically supportive of the Forum but unable to cover the costs of the entire event (IDRC invested \$300,000). In addition, the EcoHealth team could not hire staff or term employees for the event. In 2001, a conference coordinator was hired under a contract with Université du Québec à Montréal (UQAM),⁸ but worked on a day-to-day basis at IDRC. According to a few interviewees, this arrangement was functional, but an administrative challenge.

"That first fall we went everywhere with our presentation. . We hit the entire Ottawa scene and presented to every donor. . That is how we got the money needed." (IDRC Staff)

Because the Centre was not able to underwrite the entire conference, it meant that an IDRC staff member and the Conference Coordinator were tasked with resource mobilization. Upon reflection, interviewees noted that the resource mobilization was quite successful—\$1.3 million⁹

⁸ UQAM was also the location of the conference and members of the EcoHealth scientific community from UQAM sat on the Program Advisory Committee.

⁹ Donors for this conference included: Health Canada, Environment Canada, Canadian International Development Agency (CIDA), the Ford Foundation, the United National Environmental Programme (UNEP), the World Health Organization, the Biodome de Montréal, the International Society for

was raised. Beyond funding, Environment Canada and the Canadian International Development Agency (CIDA) were also able to acquire translation services, which are accessible to Canadian ministries. It was felt that on the one hand, this type of resource mobilization was an “invaluable” method of engaging a diverse spectrum of donors. On the other hand, it was also described as a “painful” process that increased workload and uncertainty.

Coordination

One representative from each of the donors was asked to sit on a Forum committee. According to interviewees, this group was quite active. They met once or twice a year in person and had teleconferences approximately every month. This committee was mainly responsible for the logistical and budgetary issues of the Forum, but also played a role in setting the agenda and, according to IDRC interviewees, supported the whole planning process. The terms of reference for this committee were described as clear and, as noted by an IDRC interviewee, the group was brought into discussions at “. . . key moments. They helped push us into deeper thinking and potential road blocks.”

A second committee, the Program Advisory Committee, comprised key thinkers in the scientific community and was tasked with creating the Forum’s agenda. The discussions were described as “rich and informative,” although it was noted that the Committee only met once. It is unclear if this was because of workload issues or if meeting more regularly was seen as unnecessary.¹⁰

Other Process Challenges

Workload

Beyond the challenges mentioned above with resource mobilization and administrative issues with the coordinator’s contract, the key challenge that affected all stages of the Forum was workload issues. Numerous interviewees mentioned that approximately six months prior to the Forum the workload increased substantially. In the words of one IDRC interviewee, “Around the six month mark you can’t imagine how much work it will be. . . . At the end we just put the other work aside and focused on the conference.” Most IDRC staff interviewed agreed that while they had known the Forum was approaching, they had not integrated the pre-conference planning work effectively enough into their work planning.

The quantity of work and the related stress also affected IDRC staff’s ability to participate in the Forum. One IDRC interviewee noted that they would have liked to participate in the sessions and connect more with research partners at the Forum, but was unable to because of their numerous responsibilities. In addition, some interviewees thought that the follow-up activities (i.e. publications) took longer than anticipated because they were not planned for appropriately before the Forum and the team was

Ecosystem Health, the Université du Québec à Montréal, and the Ministry of Health and Social Services for the Government of Québec.

¹⁰ It was noted that program advisory committee members had full agendas and that online chat tools were not commonly used in EcoHealth for virtual meetings

exhausted. “After the conference we were completely exhausted and it was very difficult to keep the momentum of the event. . . . It would have been better if we had planned the work load better.”

Planning Details

While interviewees felt it is not possible to plan for everything, some seemingly smaller details at the Forum turned into stressful situations. Two very specific challenges were noted. First, because translation services were externally coordinated, the type of presentation documentation required ahead of time was unknown. One IDRC interviewee noted that they ended up having to locate this documentation quickly, which proved to be quite stressful. Second, it was noted that rapporteurs—an important element of any conference—need to be prepared ahead of time. In addition, these rapporteurs should have some background knowledge of the topic being discussed.

Key Process Successes

Preparatory Phase

The key successes in the preparatory phase were mentioned above: **successful resource mobilization** and **multi-stakeholder committee participation**.

Active participation of both provincial and federal levels of government was also impressive. In general, the successful coordination of an event that hosted over 350 participants from 42 different countries was noted as an outcome of extremely meticulous and conscientious planning.

“Despite pressure and the stress everyone seemed really happy and willing to do their part. . The team was really dedicated to the cause and it was very cohesive. Everyone worked really, really hard.” (IDRC Staff)

Conference Phase

A few interviewees said that the **innovative nature of the agenda** was one of the most successful aspects of the EcoHealth Forum. As noted by an IDRC interviewee, “One of our main concerns for the conference was that we wanted it to represent the views of the South.” The program was designed with a format that was intended to give Southern researchers as much exposure as possible. It took a “three-pronged” approach—classic presentations, plenaries, and poster-driven seminars. Each day of the six-day Forum had a different theme. The morning session was a plenary that demonstrated the work from both Northern and Southern researchers. The afternoon sessions were a combination of classic presentations and poster-driven seminars.¹¹

“There was a global audience and we all realized we are not alone in our own corner but that there was a community of people that were working on EcoHealth issues.” (IDRC Staff)

Evidence collected for the Forum’s evaluation report¹² noted the success of the most innovative activities of the program. Poster-driven seminars were chosen unanimously as

¹¹ The poster-driven seminar was an idea that came out of the PAC, where numerous researchers presented a pre-made poster of their work for 10 minutes, after which the poster was debated and discussed. .

the best sessions of the Forum, followed by morning plenary sessions and down-to-the-ground¹³ activities. (Ortega-Alarie 2003: 14).

Finally, the dedication and cohesive nature of the **EcoHealth team** was noted as one of the key elements contributing to the success of the Forum. As the conference lead, the IDRC team (including EcoHealth, Communications, and Grant Administration and Finance and Administration divisions) took full responsibility for making sure the conference went as planned. As one interviewee commented, “I can’t believe how much work we did. The EcoHealth team has bonded for life. The Forum is something that has shaped me professionally.”

Follow-Up Phase

While it is beyond the scope of this study to analyze all of the post-conference activities, one key follow-up activity that came out of the conference was the creation of a **community of practice**. The creation of this community of practice was based on the understanding that the Forum was not a stand-alone activity, but rather a means to develop the EcoHealth Program Initiative and the community of EcoHealth practitioners.

Key Lessons

The EcoHealth Forum case study reveals six key lessons that could be used to guide IDRC’s future participation and involvement as a lead in large conferences.

1. Determine the most appropriate role for IDRC.
2. Recognize transaction costs.
3. Establish an internal IDRC committee.
4. Plan for evaluation activities in the preparatory phase.
5. Secure buy-in from senior management.
6. Focus on IDRC strengths.

Determine the Most Appropriate Role for IDRC

In 2001, it was fitting for IDRC to implement this forum because the EcoHealth field itself was new and budding. But, as noted by one IDRC interviewee, “. . . as the field has evolved and matured, it is not for IDRC alone to organize these types of fora. . . . We can still play an important role, but there should be more active involvement of our research partners.” In addition, given the level of engagement required for this type of forum, it would be important to determine how frequently an event of this magnitude could be undertaken. The frequency also should take into consideration workload issues for all parts of the Centre and its research partners.

Recognize Transaction Costs

While donor funding may have actively engaged a broad array of stakeholders, the process to secure this funding was time-consuming. In addition, to reduce the

¹² The participant survey received 99 responses and thus serves to triangulate the data given from the interviews conducted.

¹³ “Down-to-the-ground” activities were site visits to different grassroots projects in Montréal.

administrative burden, a conference coordinator should be contracted by IDRC not by a partner organization.

Establish an Internal IDRC Committee

The EcoHealth Forum was successful in creating two external committees, one of which was quite active. However, an internal committee comprised of the major IDRC players was never struck. Instead of having multiple and regular bilateral conversations with different parts of the Centre, it was recommended that it would have been easier and more effective to have an internal committee.

Plan for Evaluation Activities in the Preparatory Phase

The preparatory phase of a major conference should include the integration of evaluation activities. For the EcoHealth Forum, an evaluation was completed as a follow-up activity, but data were not collected in a systematic manner throughout the conference. While there were certain donor requirements for evaluation, these reports were not considered “use-oriented,” or geared towards internal IDRC learning. In addition, it was recommended that an after action review (AAR) be completed with IDRC staff immediately following the conference.

Secure Buy-In From Senior Management

Numerous interviewees stressed the importance of engaging senior management in IDRC and in all partner organizations as a means of securing their buy-in to the event. Further, messaging from the top level needs to “trickle-down.”

Focus on IDRC Strengths

Related to the Centre defining its role in the conference, some interviewees felt that IDRC should “stick to what we do best.” Instead of dealing with the administration and logistics of the event, some believed that IDRC should have focused its resources on empowering and building the capacity of researchers from the South. It should concentrate on “bringing the learnings and the great work the Centre does to the international arena.”



Case Study 2: Partner-Led Event

Filling the Gap, IDRC at the Third Global Knowledge Conference

The Third Global Knowledge Conference (GK3) was held in Kuala Lumpur, Malaysia, from December 11–13, 2007. The Conference consisted of over 60 panels and workshops on information communication technologies (ICTs) under the themes of Emerging Markets, Emerging People, and Emerging Technologies. More than 1,700 people attended the Conference and IDRC supported the participation of 176 research partners. The Centre provided the Global Knowledge Partnership (GKP) with a \$1.3 million grant to develop and implement the Conference. Together with the Swiss Agency for Development Cooperation (SDC) and GKP, IDRC helped shape, organize, and support GK3. Key players from IDRC included the Information Communication Technology for Development (ICT4D) Program Area, Communications Division, a corporate meeting planner, and a conference coordinator.

Intentions, Influences, and IDRC Fit

Starting in mid-2002, IDRC became involved in the World Summit on the Information Society (WSIS) process. WSIS took place in two phases (Geneva 2003 and Tunisia 2005). Prior to WSIS, there had been two Global Knowledge (GK) conferences starting with GK1 in Toronto in 1997. During the WSIS process, the GK conferences were put on hold to increase participation in WSIS and avoid duplication of efforts. In response to the perceived gap left after the WSIS process ended, IDRC partnered with Global Knowledge Partnership (GKP) and Swiss Development Cooperation (SDC) to create the Third Global Knowledge Conference (GK3). GK3 emerged as a “post-WSIS milestone event where the future of intersecting emerging markets, people, and technologies would be debated amongst Information and Communication Technology for Development (ICT4D) and Knowledge for

“Now that we have danced on other people’s stage, maybe now we should take the lead and create our own stage and do that in partnership with GKP.” (IDRC staff speaking on the original intentions of the conference)

“... now that the WSIS process is over this might be the only international event where the ICT4D community globally gets together to discuss things.” (IDRC staff)

Development (K4D) practitioners from civil society, government, the private sector, and academia.” (Final Report GK3)

In the 2005 Information Communication Technology for Development (ICT4D) Program Area report to IDRC’s Board of Governors, a key objective was to “foster the global development of regional networks and recognize the potential contribution the GKP could make in remerging as an important platform for the global exchange of best practices in the years to come.” GKP was seen as a “natural IDRC partner” for this type of large ICT4D conference, as it had spearheaded two other large events on the topic (in 1997 and 2000) and was seen as a leader in the field.

In April 2006, IDRC became involved in shaping the Conference with SDC and GKP. This decision was marked with an IDRC investment of \$1.3 million in the form of a grant to GKP to develop and implement the Conference.

Planning and Coordination Issues: Balancing Expectations

As recounted by a number of IDRC interviewees, GK3 was to be a combination of “sizzle” and “platform.” The sizzle would put on a show in order to engage and excite the international community about ICT4D. The platform would create an opportunity for research partners and staff to come together to share and learn from each other and promote their work to a wider audience. Both IDRC interviewees and the GK3 focus group noted that, over time, the emphasis on the future of the ICT4D field became more important to IDRC: “IDRC was there to share and learn with the rest of the conference attendees to get a sense of where this field is going.” (IDRC staff)

While some staff members were inclined toward a more frugal platform, others emphasized the importance of the “sizzle,” which required a larger financial commitment. This difference in opinion caused challenges that, according to one IDRC staff member, were not reconciled.

The priority of the “sizzle” also created low expectations among some staff and partners for the potential success of the Conference. According to the Action Team focus group, IDRC staff at all levels seemed “hot and cold” towards GK3 and, at times, there was a certain amount of negativity towards the Centre’s participation. During the planning phase, the Action Team created weekly meetings with ICT4D staff to try to alleviate some of this negativity and build momentum for the Conference.

“Wavering from top levels [at IDRC] trickles down and the messages get confused.”
(IDRC staff)

“There was not consistent enthusiasm to put on this conference . . . many of the program managers were not that keen.”
(IDRC staff)

According to IDRC interviewees, it became apparent early on that some staff expected IDRC to have a key role in both the planning and the implementation of the Conference because of the substantial financial investment from IDRC. However, since there was no

consensus within IDRC about conference priorities (sizzle versus platform), these expectations created tensions and challenges during the planning phase.

Coordination

In terms of shaping the conference agenda, IDRC was a part of the creation, coordination, and implementation process of GK3 with GKP and SDC. A representative from IDRC sat on the GK3 Working Committee, which comprised one representative each from GKP, SDC, and IDRC. The same IDRC representative attended the GKP executive meetings, which shifted their focus to just GK3 approximately one year before the Conference.

Setting the agenda for the Conference became complex, given the different levels and structures of coordination and because of the internal IDRC tensions about the focus of the Conference. In an effort to create a democratic process for setting the agenda, it was decided that there would be an open call for proposals to all GKP members. Generally, this process was seen as legitimate; however, not all of the proposals fit with the conference framework of people, community, and technology.

Finally, an internal IDRC action team was created, which included the lead IDRC Program Officer, a research officer from Pan-Asia, the GK3 Coordinator, two representatives from the Communications Division, an IDRC meeting planner, and an administrative coordinator.

Other Process Challenges

The two GK3 focus groups and staff interviewees noted some key challenges in the pre-conference phase. The challenges were related primarily to lack of clarity about roles and responsibilities in a number of key conference planning activities, including grant administration and evaluation.

Grant Administration

Having IDRC's GK3 Coordinator "embedded" in GKP created some confusion related to the Recipient Administered Portion (RAP) grant. The RAP was intended to be used for scholarships (which included travel and conference costs) for IDRC's research partners. These scholarships were to be administered by GKP. According to an IDRC staff member, it became clear that GKP was relying heavily on IDRC's GK3 Coordinator to administer these scholarships. Upon the clarification of responsibilities, the Centre's Grant Administration Division (GAD) staff engaged in some capacity building activities (mainly mentoring and offering IDRC templates and other good practices) to assist GKP in the administration of these scholarships. IDRC staff suggested that this approach—clarifying roles and building capacity in areas where the partner is having difficulty—worked well and could be used in the future.

Staff turnover and changes in responsibilities within IDRC also had an impact on the effective management of the overall GKP grant. This included changes in the lead IDRC GK3 organizer, the project officer managing the GKP grant, and a new ICT4D Director.

Evaluation

The Action Team and IDRC staff interviewees identified lack of clarity around roles and responsibilities as posing a challenge to carrying out the evaluation plan for GK3. An IDRC staff member identified the three principle challenges as:

“Clearly identifying who is responsible for the evaluation of [the conference] as a part of the grant . . . would have been very helpful because then we would have known who was the decision maker.”
(IDRC staff)

- 1) *Poor communication:* There were unspoken assumptions and beliefs about IDRC’s role at GK3, which led to questions about IDRC’s participation. According to one interviewee, it felt at times as though the different evaluations were being used to further agendas related to GKP, GK3, and ICT4D. This created confusion that kept surfacing.
- 2) *Unclear roles and responsibilities:* The role of the Centre’s Evaluation Unit (EU) was not well defined or communicated. Because of the decentralized nature of evaluation at IDRC, the EU provided technical assistance to the GK3 team, but it was not the EU’s role to create and implement an evaluation plan for the Conference. However, because of the decentralized nature of decision making for the Conference, it was never clear as to who within ICT4D was ultimately responsible for evaluation, which caused confusion.
- 3) *Multiple evaluations:* Multiple evaluations were being conducted at multiple levels, including this strategic evaluation by the EU, GKP’s evaluation of GK3, an evaluation as a part of the grant to GKP, and an evaluation of IDRC’s participation in GK3. The different concurrent evaluative efforts caused confusion as to what type of evaluation was necessary, who was responsible for evaluation, and how these evaluations were going to be used.

The Action Team recommended that in the future a member of the GAD team and the Evaluation Unit be added to the central coordination team. Alternatively, it was suggested that, as with other IDRC projects, the conference team elect one responsible officer for the evaluative work of a conference with the Evaluation Unit providing technical assistance.

Key Process Successes

Preparatory Phase

The IDRC Action Team noted that when a partner organization is supported to implement a large conference with IDRC funds, critical decisions need to be made early on in the process of designing the **coordination structures**, if the Centre wants to be able to identify key areas of strategic importance and bring these areas effectively to the table. For example, the Action Team successfully lobbied for having a prominent spot on the conference agenda. Those interviewed noted that this was one of IDRC’s greatest successes in the preparatory phase of the Conference. Along with ICT4D staff, the Action

Team determined the areas of strategic importance for the Centre that needed to be brought to, and focused on by the GK3 Working Committee.

The focus groups and staff interviewed agreed that the internal Action Team was fundamental to the success of IDRC's participation in this conference. This team, which brought together different parts of the Centre, met regularly and worked closely together. A member of the Action Team (the GK3 Coordinator) also worked closely with the GKP both before the Conference and on the conference site. As noted by a member of the Action Team "[the GK3 Coordinator being] embedded with GKP, and traveling back and forth from Malaysia was a significant thing that we did right." While in Malaysia, the GK3 Coordinator facilitated communication and provided invaluable access to information, which helped IDRC staff and partners stay well informed and facilitated the coordination of certain workshops and services (i.e., the pre-conference inter-activity support).

"The GK3 Coordinator was the lynch pin in our connections to GKP. . . . Short of meeting face-to-face, she was the next best thing." (IDRC staff)

Some of the research partners interviewed also commented on IDRC's effective coordination in the preparatory phases of the Conference. Although communication mostly happened via email (which had its own strengths and weaknesses), interviewees suggested that the preparatory phase went as smoothly as could be expected. In addition, some research partners, particularly session organizers, appreciated the interactive mentoring given by IDRC staff and GK3 consultants.

One of the highlights at GK3 was the **Support Design Helpdesk** offered to GK3 session leads, moderators, panelists, and workshop hosts to enable a more creative and interactive approach to designing and hosting panels and workshops. Through the Support Design Helpdesk, session leads and others could have access to professional facilitators and coaches to provide one-on-one support in planning their GK3 session (GK3 Support Help Desk—Learning Report). "The detailed GK3 and IDRC planning procedures were useful for formalizing session content amongst the participants early on, freeing up the session organizers to focus on mobilizing novelty in presentation. As one of the panel organizers, I was also very appreciative of the opportunity to discuss strategies for effective audience participation with the presentation resource person offered by GK3" (IDRC Research Partner).

"The variety of presentations and creative approaches across the GK3 sessions was an inspiration to be more talented in communication about our research and findings." (IDRC Research Partner)

Conference Phase

Numerous research partners and IDRC staff noted the **interactive nature** of IDRC's sessions. Many felt this was extremely successful and set IDRC's sessions apart from the other panels and sessions at GK3. Support for interactivity was offered before the Conference, through one-on-one online coaching sessions, and at the Conference by the Support Design Helpdesk.

The Action Team and an IDRC staff remarked on the importance of maintaining “**spaces to maneuver**” at the Conference and remaining **flexible and open-minded**. For example, the graphics recording facilitator was added “at the last minute,” but was noted as a successful addition to the Centre’s participation by a few staff and research partners. A member of the Action Team explained, “Anything is possible once you actually get to the conference. You can only hope that you have planned enough, but it is important not to stress too much if things do not go exactly as planned.” The importance of remaining flexible, open-minded, and responsive to change at a conference cannot be underscored enough.

Key Lessons

The GK3 case study reveals six key lessons that could be used to guide IDRC’s future participation and involvement in partner-led large conferences.

1. Select like-minded partners.
2. Determine areas of strategic importance for IDRC.
3. Clarify roles and responsibilities.
4. Establish effective coordination structures.
5. Ensure that the conference partnership is part of an on-going relationship.
6. Ensure clear and frequent communication.

Select Like-Minded Partners

Particularly related to this type of large conference, selecting like-minded organizations with which to partner is important. The ideal partners will be leaders and highly regarded by a diverse spectrum of stakeholders in the respective field; they will have a long-standing relationship with IDRC, experience in coordinating large events, and similar philosophies and values to IDRC. In addition, IDRC should select donor partnerships carefully to ensure that the values and agendas of each organization are complementary.

Determine Areas of Strategic Importance for IDRC

During the preparatory phase, it is necessary to recognize that there is a trade-off between having a partner lead the organization of the conference and having IDRC control the agenda. It is important to determine areas of strategic importance to the Centre and find entry points within the process where the Centre can have appropriate influence.

Clarify Roles and Responsibilities

Roles and responsibilities should be clarified among the different parts of the Centre, with the implementing partners, and with research partners.

Establish Effective Coordination Structures

Establishing effective coordination structures that include all of the key partners involved in the conference is vital. Leading up to the conference (approximately one year in advance), these committees and groups should meet regularly. In particular, bi-lateral meetings should be avoided to eliminate confusion and miscommunication.

Ensure That the Conference Partnership Is Part of an On-Going Relationship

Partners that are supported by IDRC to organize and implement these types of events, as well as research partners who participate in them, should have an on-going relationship with IDRC. The implementation of and/or participation in a conference should be viewed as one piece in a relationship path and should continue to uphold IDRC's values and philosophies of research for development. Opportunities to support capacity and skill building need to be identified.

Ensure Clear and Frequent Communication

Clear and frequent communication should take place between the different parts of the Centre involved in the conference, and between the Centre and the implementing partners and the Centre's research partners.

5. Lessons Learned From IDRC's Participation in Large Conferences

This section explores the overall lessons learned from the eight large conferences examined in this study. The lessons are organized into three categories—preparation, conference, and follow-up—that match the different phases involved in planning and participating in a conference. While the lessons are derived mainly from the document reviews, they are also informed by material gathered from the interviews and focus groups.

Lessons from the Preparatory Phase

Seven key lessons related to the preparatory phase of participating in large conferences emerged from the review of conference reports and the interviews and focus groups:

1. Set a critical path.
2. Build a realistic timeline.
3. Plan for follow-up activities.
4. Gather support from appropriate IDRC divisions.
5. Coordinate with Canadian actors.
6. Define and communicate expectations and opportunities for IDRC staff and research partners.
7. Weigh environmental costs.

Set a Critical Path

Many of the final reports and focus group participants recommended that the first step in developing a critical path be to determine the *type of engagement* IDRC would like to have in the conference. Defining the type of engagement should also allow IDRC to develop clear objectives for participation and a strategic niche in the conference, both for the Centre and for research partners. The type of engagement can also serve as the focus for a use-oriented evaluation plan, which can be integrated into the critical path. This approach can help indicate the level of investment (financial and human resources) that will be required, the type and quantity of activities in which to become engaged, and the different parts of the Centre that should be involved in the process.

The critical path should clearly identify roles and responsibilities and develop clear and frequent lines of communication amongst the different players involved in the conference. The types of questions that can be asked when developing a critical path include:

1. Why should IDRC engage in the conference?
 - To what extent should the Centre engage?
2. How should IDRC engage in this conference?
 - What are the key objectives of this engagement?
 - What will this engagement look like?

- How will the objectives for engagement be measured? How will we know if we are successful at achieving these objectives?
 - How best could we ensure that IDRC, as well as partners, receive opportunities to raise awareness of research and research support?
 - How could we situate our work and that of our partners within broader conference discussions?
3. Who should be involved?
- What financial and human resources should IDRC invest?
 - What does IDRC realistically have to invest?
 - Who should be involved (within and outside of IDRC)?
 - What should their responsibilities be?
 - How should these people communicate with each other?
4. When should the planning happen?
- Given the timing of the conference and the type of engagement IDRC would like to have, when should the preparatory phase begin?

Build a Realistic Timeline

In six out of the eight conferences reviewed, it was strongly recommended that the amount of work involved be planned for and taken into consideration. Conference preparation should not be added to staff workload at the last minute but rather “. . . if we see ourselves engaging more and more in such events, the time required needs to be anticipated and built in to yearly work-plans for staff.” (Final International AIDS Conference Report). It was also suggested that, where possible, programs build conferences into their prospectuses.

Plan for Follow-Up Activities

Participation in large conferences can be end-heavy and staff and partners are often exhausted after the conference. A realistic follow-up plan should be clearly articulated in the planning phase instead of tacked on as an after-thought once the conference is finished.

Gather Support From Appropriate IDRC Divisions

As noted in a number of the conference final reports and three interviews, part of determining roles and responsibilities entails including the appropriate divisions of the Centre that should be involved with the conference planning process. Communications Division, for example, participates regularly in conferences that will help meet the objectives set out in their strategy. Other key players include IDRC meeting planners, the Evaluation Unit (to provide technical assistance for developing evaluation plans and data collection techniques), and Partnership and Business Development Division (to assist with forging donor partnerships and at conference receptions). It is important to connect with the different IDRC players as soon as the critical path has been developed to allow for effective work planning.

Coordinate With Canadian Actors

Identifying synergies and overlaps with other key Canadian actors during the planning stage is highly recommended. IDRC often interacts with governmental actors in conference activities (e.g., for the EcoHealth Forum, AIDS Conference, WSIS, and WUF), but keeping abreast of the Canadian federal engagement and its critical developments can be time-consuming. However, it offers numerous benefits (e.g., synergies, cost-effectiveness, access to translation, and creating awareness for IDRC's work) if planned for in advance. Planning is critical, since activities can be constrained by the lengthy multi-level approval processes. Strategic opportunities to work with like-minded civil society actors could also be pursued.

Define and Communicate Expectations and Opportunities for IDRC Staff and Research Partners

While large conferences are often viewed as a mechanism to build awareness for the research supported by the Centre, they also create opportunities to build capacity among IDRC staff and research partners. These targeted capacity-building activities can be included in the critical path. For example, WUF and GK3 integrated helping research partners develop interesting, interactive presentations into their initial conference planning process.

It is also important to understand research partners' expectations and constraints for participating in a conference and to address these in planning the conference agenda. For example, long and intense travel and difficulties in attaining visas can affect partners' willingness and enthusiasm to participate and IDRC may need to make accommodations to make participation viable.

Weigh Environmental Costs

When planning conference participation, it should be determined if a face-to-face event is the most appropriate type of engagement or if more environmentally friendly tools (e.g., on-line discussions, second life meetings) could be used and be as effective. If it is determined that a face-to-face conference is the most effective strategy, IDRC participants (staff and partners) could earn their travel miles through carbon credits. Carbon credits have financial and logistical ramifications and thus, should be considered in the preparatory phase.

Lessons From the Conference Phase

Six key lessons related to the conference phase of participating in large conferences emerged from the review of conference reports and the interviews and focus groups:

1. Include IDRC welcome activities.
2. Design space for formal and informal interactions.
3. Procure on-site support.
4. Arrive early.
5. Limit piggybacking.
6. Reduce the environmental footprint.

Include IDRC Welcome Activities

Numerous reports and research partners interviewed noted the importance of an IDRC welcome. For example, at GK3 all IDRC and staff attended a Welcome Session led by the Action Team. At the Welcome Session, the Action Team informed people of the IDRC agenda—the many IDRC-supported panels and workshops and the location of the reception. This session also gave research partners a chance to get to know each other informally. Partners can be uncertain about where or how to connect with IDRC staff and other partners, particularly at large events with many participants and venues. A Welcome event gives staff and partners a chance to interact right at the beginning of the conference and creates a foundation for further networking and information sharing.

Design Space for Formal and Informal Interactions

The conference agenda should be designed in a way that fosters both formal and informal interaction. Interactive panels and sessions provide formal opportunities for partners to interact and promote their work. Successful informal opportunities for interaction include reception dinners, social and cultural events, and local project visits. As well, the IDRC booth often acts as an informal meeting and networking place as well as a spot where partners can always find an IDRC representative. Some conferences offered convenient “work” stations and meeting rooms for IDRC participants.

Procure On-Site Support

It is particularly challenging to coordinate a conference in a different region and time zone. A local consultant can be invaluable in providing assistance to IDRC staff with logistical and technical “on-the-ground” needs. In the conferences reviewed, on-site support also included staff or volunteers to help administer evaluation tools and collect evaluation data, translation services, and rapporteurs for the IDRC sessions. Three of the final conference reports noted the importance of hiring rapporteurs with substantive knowledge of the discussion topic.

Arrive Early

IDRC staff (i.e., the internal committee, or at least the meeting planner, conference coordinator, and key responsible officer) should arrive on-site a few days before the conference. As noted in both of the case studies, it was difficult to plan for everything at the conference. Staff on-site can respond more quickly to spur-of-the-moment changes and challenges.

Limit Piggybacking

Related workshops, meetings, or sessions are often scheduled as pre- or post-conference activities. While there are time and cost-related reasons for this piggy-backing, too many events in a row can be overwhelming and exhausting. When defining expectations for the conference in the preparatory phase, research partners should be asked if their attendance in multiple sessions is possible and realistic.

Reduce the Environmental Footprint

At the conference, IDRC should make every attempt to be as environmentally conscious as possible. Paper-free booths, limited hand-outs, and supporting the use of re-useable bags, bottles, and utensils are just a few ways to integrate good environmental practices into the Centre's participation.

Lessons From the Follow-Up Phase

Five key lessons related to the follow-up phase of participating in large conferences emerged from the review of conference reports and the interviews and focus groups:

1. Plan for follow-up.
2. Use after-action reviews and evaluations.
3. Communicate IDRC participation with Centre staff.
4. Follow up with research partners and potential partners.
5. Follow up with in-country hosts.

Plan for Follow-Up

Because the actual conference often consumes staff time and financial resources, effective follow-up can be overlooked. As noted both within the literature as well as in the EcoHealth case study, large conference should be seen as a “means” to a clear objective rather than an “end” in-and-of itself. Follow-up activities—such as after-action reviews, evaluations, and follow-ups with partners and hosts (discussed below)—should be planned and integrated into the critical path for the conference.

Use After-Action Reviews and Evaluations

It was noted by numerous IDRC interviewees that after-action reviews (AARs) are an important reflective tool that should occur directly after the event. An AAR poses three major questions:

- What did we set out to do? What were the main goal and priorities?
- What went well, and why?
- What can be improved, and how?

Based on the evaluation plan developed in the preparatory phase and the data collected at the conference, a final evaluation output should be prepared internally or by an evaluation consultant. The evaluation can help determine if additional follow-up activities are required. This output could take the form of a report, a presentation, and/or video.

Communicate IDRC Participation with Centre Staff

To keep IDRC staff across the Centre informed and to help maximize learning from these types of events, it is useful to prepare an all-staff event (e.g., brown-bag lunch) that would describe the nature of the Centre's participation, highlight successes and challenges, and share lessons learned from participating in the conference. The evaluation output can synthesize the components of the Centre's participation and be used for the all-staff event, if it has been selected with this use in mind.

Follow Up With Research Partners and Potential Partners

Research partner participants should be given an opportunity to express whether expectations were met, the outcomes and successes achieved, as well as any challenges encountered at the conference. In addition, a full list of participants should be sent to both IDRC staff and research partners to facilitate new/potential partnerships. Finally, IDRC staff should thank research partners for their participation in the event.

Follow Up With In-Country Hosts

Follow up with in-country conference hosts (e.g., support at the conference, staff at the conference site, etc) is an important but often overlooked element of the follow-up phase. Providing both positive feedback as well as constructive criticism can offer important lessons for conference hosts. A member of the internal action team can also send thank-you cards to hosts who have been particularly helpful to IDRC staff and research partners.

Annex 1: List of Acronyms

AAR	After Action Reviews
ABRASCO	11 th World Conference on Public Health
AIDS	Acquired Immune Deficiency Syndrome
CIDA	Canadian International Development Agency
ENRM	Environment and Natural Resources Management
GAD	Grant Administration Division
GEH	Governance Equity and Health
GGP	Globalization, Growth and Poverty
GK3	Third Global Knowledge Conference
GKP	Global Knowledge Partnership
HEMA	Health and Environment Ministries of the Americas
ICA	Institute for Connectivity in the Americas
ICT	Information Communication Technology
ICT4D	Information Communication Technology for Development
IDRC	International Development Research Centre
LACRO	Latin America and the Caribbean Regional Office
NGO	Non-Governmental Organization
PAC	Program Advisory Committee
PAD	Project Approval Document
PI	Program Initiative
PBDD	Partnerships and Business Development Division
PPB	Programs and Partnerships Branch
SDC	Swiss Agency for Development Cooperation
SID	Special Initiatives Division
UN	United Nations
UNEP	United Nations Environment Program
UQAM	Université du Québec à Montréal
WUF	World Urban Forum
WSIS	World Summit Information Society
WSSD	World Summit on Sustainable Development
WWF	World Water Forum

Annex 2: List of Key Informant Interviews

IDRC staff and partners—GK3

NAME	ORGANIZATION/POSITION	METHOD OF CONSULTATION
IDRC staff (n=7)		
Allison Hewlitt	Senior Program Officer, Bellanet	Phone Interview
Michael Clark	Director, ICT4D	Interview
Michael Roberts	Acting Executive Director, Bellanet	Phone Interview
Rich Fuchs	Regional Director, Regional Director ASRO	Interview
Rohinton Medhora	Vice-President Programs	Interview
Sarah Earl	Acting Director, Evaluation Unit	Interview
Vilma Gamero	Administration Officer	Interview
IDRC partners (n=6)		
Allison Gillwald	Link Centre, University of the Witwatersrand/ Director, Research ICTAFRICA	Phone Interview
Amy Mahan	LIRNE/ Global Coordinator	Phone interview
Angelo Juan Ramos	Molave Development Foundation/Executive Director	Phone Interview
Ineke Buskens	Research for Future/ Research Director	Phone Interview
Natasha Udu-gama	LIRNEAsia/Haszlo Project Dissemination Manager	Phone Interview
Shariq Khoja	Aga Khan University/Assistant Professor, Department of Community Health Sciences	Phone Interview

IDRC Staff and Partners EcoHealth

NAME	ORGANIZATION/POSITION	METHOD OF CONSULTATION
IDRC Ottawa (n=6)		
Anne-Marie Legault	EcoHealth Coordinator	Interview
Chantal Schryer	Director—Communications	Interview

Francine McEwen	Program Assistant—EcoHealth (at the time of conference)	Interview
Jean Lebel	Director, ENRM	Interview
Jean-Michel Labatut	Senior Program Specialist, EcoHealth	Interview
Zsafia Orosz	Research Officer	Interview

Focus Groups

NAME	ORGANIZATION/POSITION	METHOD OF CONSULTATION
Focus Group: Action Team (n=4)		
Emmanuelle Dany	Meeting Planner	Focus Group
Marcia Chandra	Coordinator of GK3	Focus Group
Nicole Leguerrier	Administrative Coordinator	Focus Group
Pauline Dole	Senior Public Outreach Officer	Focus Group
Reflecting on Learning and Outcomes from GK3—All Staff workshop (n=15)		
Barbara Porrett	Electronic Services Librarian, IRIMS	Reflective Workshop
Chaitali Sinha	Program Officer, PAN Asia	Reflective Workshop
Chantal Schryer	Director Communications	Reflective Workshop
Emmanuelle Dany	Meeting Planner	Reflective Workshop
Francine Bouchard	Information Officer	Reflective Workshop
Frank Tulus	Senior Program Officer, TELECENTRE	Reflective Workshop
Genevieve LeFebvre	Research Officer, ACACIA	Reflective Workshop
Khaled Fourati	Program Officer, ACACIA	Reflective Workshop
Laura Haylock	PDA, Evaluation Unit	Reflective Workshop
Laurent Elder	Program Leader, PAN Asia	Reflective Workshop
Michael Clarke	Director, ICT4D	Reflective Workshop
Nicole Leguerrier	Administrative Coordinator	Reflective Workshop
Pauline Dole	Senior Public Outreach Officer	Reflective Workshop
Rob Robertson	Senior Advisor Law & Development, IPS	Reflective Workshop
Silvia Caicedo	Research Officer, PAN Asia	Reflective Workshop

Annex 3: Documents Reviewed

From ABRASCO:

Gray-Donald, Lucy. “IDRC at the 11th World Congress on Public Health/8th Brazilian Congress on Collective Health, August 21st to 25th, Rio de Janeiro, Brazil—Evaluation Report.”

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Jessani, Nasreen. “XVI International AIDS Conference August 13–18, 2006 Toronto, Canada—Final Report”

Jessani, Nasreen. “XVI International AIDS Conference August 13–18, 2006 Toronto, Canada—Evaluation Report”

From Third Global Knowledge Conference (GK3):

Preparatory Documents:

Chandra, Marcia. “IDRC at GKIII: Objective, Key Messages, and Q&A.”

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Draft Communications Strategy. “IDRC’s Participation at the Third Global Knowledge Conference—Kuala Lumpur, Malaysia—December 11–13, 2007.

Fuchs, Richard. “First Draft—Event Thematic Overview. Global Knowledge III. An Event on the Future—Emerging people, Emerging Markets, Emerging Technology.” June 28, 2006.

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Earl Sarah. “Trip Report—Kuala Lumpur, Malaysia.” December 5–13, 2007.

Emdon, Heloise. “Trip Report—Kuala Lumpur, Malaysia.” December 7–16, 2007

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Final Reports:

Chandra, Marcia. “IDRC & Partners: At the Third Global Knowledge Conference—December 11–13 2007—Final Report.” April 2008.

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Ghose, Rana. “Digital Video Training at GK3: A Report.” December 15, 2007.

Glad, Tatiana. “GK3 Support Design Helpdesk—Learning Report December 2007.”

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Hewlitt, Allison. “GK3 After Action Review.” December 13, 2007.

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Notes from Workshop. “GK3 Reflecting on Learning and Outcomes Workshop” February 1, 2008.

From International Forum on Ecosystem Approaches to Human Health:

Preparatory Documents:

Communications Plan. International Forum on Ecosystem Approaches to Human Health—May 18–23, 2003. “Turning Knowledge into Action.”

Forum Committee and IDRC Terms of Reference. (found on: Ecosystem Approaches to Human Health Program Initiative website)

Program Approval Documents (PADS):

International Forum on Ecosystem Approaches to Human Health (Project Number 100840 and 100749)

Ecoforum Policy Briefs (Project Number 101501)

Ecosystem Approaches to Human Health Exhibit at Montréal Biodôme (Project Number 101057)

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Final Reports:

International Forum on Ecosystem Approaches to Human Health. “List of Final Outputs.”

“EcoHealth Forum 2003: Setting the Grounds for Action.” A Presentation to the IDRC Board of Governors.

International Forum on Ecosystem Approaches to Human Health Forum Committee Meeting Notes. November 27, 2003.

Ortega-Alarie, Gioconda. “Evaluation Report: International Forum on Ecosystem Approaches to Human Health.” Montreal May 18–23, 2003.

RFP Dynamiques—Troisième Interview. Forum international sur les approches écosystémique de la santé humaine (2003). (Numéro de projet : 100840).

International Forum on Ecosystem Approaches to Human Health. Final Report Submitted to Health Canada. November 2003.

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Chargée de projet : Donna Mergler, Coordonnatrice : Anne-Marie Legault.

From World Summit on the Information Society (WSIS):

Communication Strategy, World Summit on Sustainable Development.

Fourati, Khaled. Evaluation Report: WSIS Phase II—November 15–19, 2005—Tunis.

Trip Report—Steve Song

From World Summit on Sustainable Development (WSSD):

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Taboulchanas, Kristina. "Coordinator Report—Preparatory Workshop Report."

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